

# Session 3

## FAFSAs and Output Documents

Questions we will answer during this session:

**W**hat information is collected on the FAFSA?

**W**hat are the different types of FAFSAs and  
output documents?

## What information is collected on the FAFSA?

*Tony comes into your office, FAFSA in hand, confused on how to answer several questions. You meet with your fellow FAAs to help him.*



- 1) Before I get to my questions, I have a question for a friend originally from Japan. She just became a U.S. citizen, although she's been in the United States for a few years. She also has an alien registration number, which she put on last year's FAFSA. Should she still include her alien registration number in number 14? What should she put for number 15?
  
- 2) My brother wanted me to ask you something, too. He is hoping his divorce will be complete any day now. He has been separated from his wife for 13 months. He is filing his FAFSA this week. How should he answer number 16?
  
- 3) Why do I have to put my parents' educational history in questions 23 and 24? Why does that matter?
  
- 4) This will be my first year in college, but I did take some college courses as a high school senior this year. What should I put for number 31?

### Tony's Questions (cont'd)

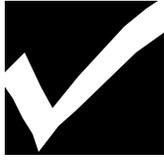
- 5) I'm not sure if I will need loans or want to do work study this year. I don't want to be tied to anything yet. How should I answer numbers 34 and 35?
  
- 6) I haven't filed my tax return yet, but I want to meet all the early financial aid deadlines. Should I still fill out the questions gathering tax information? If I estimate, what if my actual tax information differs when I actually file my taxes?
  
- 7) My friend was on active duty in the Army, but was honorably discharged. How should he answer number 57?
  
- 8) My parents are separated. I live with my mom most of the time now. I see my dad on weekends and some holidays. He sends my mom a lot of money every month to support us, though. He also told me to tell you that he claims me as a dependent on his tax return. Whose tax information should be included in Step Four?
  
- 9) My friend, Tina, has a mean stepmom. She told Tina she won't supply any of her tax information for Tina's FAFSA. Tina can get her dad's information. Will this be sufficient for Tina to get financial aid?

### Tony's Questions (cont'd)

- 10) What about my other friend, Sam? His parents travel all the time, so Sam lives with his grandparents. Should he put his grandparents' data in Step Four? Why or why not?
  
  - 11) Let's step back to Step One for a minute. The parents of my other friend, Howie, died two years ago. He lives with his aunt. Should the amount she spends on Howie's food and shelter count as part of Howie's income on the FAFSA? His aunt also makes his monthly car payment, which is a debt in his name. Should that count as Howie's income? Why or why not?
  
  - 12) My sister does not live at home anymore. My mom sends her enough money for everything – rent, food, you name it. She wanted me to ask you about number 77. Should she include my sister as part of the household? Why or why not?
  
  - 13) If I decided to move in with my girlfriend, and she pays all my living expenses, would I be counted in her household size when she files a FAFSA? Why or why not?
- 
- 
- 14) I'm not sure which school to attend, and I don't know which college to list first in Step Five. What do you suggest?
  
  - 15) You answered so many questions. Should you fill out the preparer's section in Step Six?
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## What are the different types of FAFSAs and output documents?

<b>Application Processing</b>		
<b>Paper FAFSA</b>	<b>FAFSA Express/ FAFSA on the Web</b>	<b>EExpress</b>
<b>How is it completed and submitted?</b>		
<p><b>The student:</b></p> <ul style="list-style-type: none"> <li>• completes the paper FAFSA; and</li> <li>• mails it in for processing</li> </ul>	<p><b>The student:</b></p> <ul style="list-style-type: none"> <li>• completes the application on a computer;</li> <li>• sends it to the CPS electronically; and</li> <li>• prints, signs, and mails the signature page (unless an independent student is using a Renewal FAFSA on the Web)</li> </ul>	<p><b>The student:</b></p> <ul style="list-style-type: none"> <li>• completes the paper FAFSA</li> </ul> <p><b>The school official:</b></p> <ul style="list-style-type: none"> <li>• enters the data electronically;</li> <li>• sends it to the CPS online; and</li> <li>• files the signed paper FAFSA</li> </ul>
<b>What are the output documents?</b>		
The student receives a SAR, and the school receives an ISIR.	The student receives a SAR, and the school receives an ISIR.	The student receives a SAR Information Acknowledgment, and the school receives an ISIR.
<b>How are changes made to the output documents?</b>		
<p><b>The student:</b></p> <ul style="list-style-type: none"> <li>• writes corrections on Part 2 of the SAR and mails it in for processing; or</li> <li>• takes corrections to the school for electronic processing</li> </ul>	<p><b>The student:</b></p> <ul style="list-style-type: none"> <li>• writes corrections on Part 2 of the SAR and mails it in for processing; or</li> <li>• takes corrections to the school for electronic processing</li> </ul>	<p><b>The student:</b></p> <ul style="list-style-type: none"> <li>• takes corrections to the school for electronic entry; or</li> <li>• requests a paper SAR, corrects Part 2, and mails it in</li> </ul>



### Checkpoint #1: Types of FAFSAs

Circle the number of any statement that is false.

- 1) Students applying through EDEExpress usually do not have to fill out a paper FAFSA.
- 2) FAFSA Express can only be completed using a PC. Macintosh users cannot apply through FAFSA Express.
- 3) Students using FAFSA on the Web should print out, sign, and submit a signature page.
- 4) Students using FAFSA Express also can complete a Renewal FAFSA using that program.
- 5) Except for PLUS Loans, a student cannot benefit from any Title IV financial aid without completing a FAFSA on paper, through EDEExpress, using FAFSA Express, or using FAFSA on the Web.
- 6) Dependent students still need to print a signature page for at least one parent to sign when using Renewal FAFSA on the Web.
- 7) Schools are not required to keep a student's paper FAFSA once they enter and submit the student's data using EDEExpress.



**1999-2000 Student Aid Report (SAR)  
Federal Student Aid Programs  
Part 1 - Information Summary**

OMB No. 1840-0192  
Form Approved  
Exp. 12/31/2000

991-23-4567  
AN-01 DRN: 6234

**IMPORTANT:** Read ALL information in Part 1 to find out what to do with this Report.

000117C041

JANUARY 30, 1999  
EPC: 300\*

JULIE A. ANDERSON  
WANNAGO WAY  
MAINTOWN, MA 00180

Read this letter carefully and review each item on Part 2 of this Student Aid Report (SAR). Follow the instructions at the top of Part 2 and in the Free Application for Federal Student Aid (FAFSA) instruction booklet to help you make corrections. If all of the information on your SAR is correct, you do not need to return it to the Federal Student Aid Programs. For additional help with your SAR, contact your Financial Aid Administrator (FAA) or the Federal Student Aid Information Center at 1-800-4FED-AID (1-800-443-3243).

If all the information on this SAR is correct, you may be eligible to receive a Federal Pell Grant and other Federal student aid in 1999-2000. Your FAA will determine whether you meet all eligibility requirements to receive aid. The amount of aid will depend on the cost of attendance at your school, your enrollment status (full-time, three-quarter-time, half-time, or less than half-time), Congressional budget restrictions, and other factors.

**HERE IS WHAT YOU NEED TO DO NOW:** Review the information on Part 2. If any of the information is incorrect, follow the instructions at the top of Part 2 to make corrections. **IF ALL THE INFORMATION IS CORRECT,** you do not need to submit the SAR to the schools you listed. All of your schools will receive the information electronically.

Your application has been selected for review in a process called verification. You must submit to your school signed copies of certain 1998 financial documents for you and your parents. Contact your FAA to find out which documents are required.

This section contains information from your student aid application (shaded items display parents' information, if provided). Use the Information Review Form (Part 2 of your SAR) to correct this information. Do not make corrections on this page; it is for your files.

1. LAST NAME	ANDERSON
2. FIRST NAME	JULIE
3. MIDDLE INITIAL	A
4. PERMANENT STREET ADDRESS	MANNAGGA WAY
5. CITY	MAINTOWN
6. STATE ABBREVIATION	MA
7. ZIP CODE	02180
8. SOCIAL SECURITY NUMBER	991-23-4567
9. DATE OF BIRTH	OCTOBER 19, 1980
10. PERMANENT HOME PHONE NUMBER	(435) 555-5554
11. DO YOU HAVE A DRIVER'S LICENSE?	YES
12. DRIVER'S LICENSE NUMBER	991-23-4567
13. DRIVER'S LICENSE STATE ABBREVIATION	MA
14. CITIZENSHIP STATUS	U.S. CITIZEN
15. ALIEN REGISTRATION NUMBER	(BLANK)
16. MARITAL STATUS	SINGLE
17. DATE OF MARITAL STATUS	(BLANK)
18. ENROLLMENT STATUS SUMMER TERM 1999	(BLANK)
19. ENROLLMENT STATUS FALL SEM/OTR 1999	FULL TIME
20. ENROLLMENT STATUS WINTER QTR 99-2000	(BLANK)
21. ENROLLMENT STATUS SPRING SEM/QTR 2000	FULL TIME
22. ENROLLMENT STATUS SUMMER TERM 2000	(BLANK)
23. FATHER'S EDUCATION LEVEL	UNKNOWN
24. MOTHER'S EDUCATION LEVEL	HIGH SCHOOL
25. STATE OF LEGAL RESIDENCE ABBREVIATION	MA
26. LEGAL RESIDENT BEFORE JANUARY 1, 1994?	YES
27. DATE YOU BECAME A LEGAL RESIDENT	(BLANK)
28. ARE YOU MALE?	NO
29. REGISTER YOU FOR SELECTIVE SERVICE?	(BLANK)
30. TYPE OF DEGREE/CERTIFICATE	1ST BA
31. GRADE LEVEL IN COLLEGE IN 1999-2000	1ST YEAR ATTENDING
32. HIGH SCHOOL DIPLOMA OR GED?	YES
33. FIRST BACHELOR'S DEGREE BY 7-1-1999?	NO
34. INTERESTED IN STUDENT LOANS?	YES
35. INTERESTED IN WORK STUDY?	YES
36. HOW MANY MONTHS RECEIVE VA BENEFITS?	00
37. MONTHLY VA BENEFITS AMOUNT	\$ 000
38. FILED 1998 IRS INCOME TAX RETURN	WILL FILE
39. TYPE OF 1998 TAX FORM USED	1040A/EZ/1041
40. ELIGIBLE TO FILE A 1040A OR 1040EZ?	(BLANK)
41. ADJUSTED GROSS INCOME FROM IRS FORM	\$ 3125
42. U.S. INCOME TAX PAID	\$ 0
43. EXEMPTIONS CLAIMED	00
44. EARNED INCOME CREDIT	\$ (BLANK)
45. STUDENT'S INCOME EARNED FROM WORK	\$ 3125
46. SPOUSE'S INCOME EARNED FROM WORK	\$ 0
47. AMOUNT FROM WORKSHEET A	\$ 0
48. AMOUNT FROM WORKSHEET B	\$ 0
49. CASH, SAVINGS, AND CHECKING	\$ 100
50. NET WORTH OF REAL ESTATE/INVESTMENTS	\$ 0

51. NET WORTH OF BUSINESS	\$ 0
52. NET WORTH INVESTMENT FARM	\$ 0
53. BORN BEFORE 1-1-1974?	NO
54. WORKING ON DEGREE BEYOND BACHELOR'S?	NO
55. ARE YOU MARRIED?	NO
56. ORPHAN OR MARD OF COURT?	NO
57. VETERAN OF U.S. ARMED FORCES?	NO
58. HAVE DEPENDENTS OTHER THAN SPOUSE?	NO
59. NUMBER OF FAMILY MEMBERS IN 1999-2000	01
60. NUMBER IN COLLEGE IN 1999-2000	1
61. PARENT(S) FILED 1998 INCOME TAX RETURN	WILL FILE
62. TYPE OF 1998 TAX FORM USED	1040A/EZ/1041
63. ELIGIBLE TO FILE A 1040A OR 1040EZ?	(BLANK)
64. ADJUSTED GROSS INCOME FROM IRS FORM	\$ 20000
65. U.S. INCOME TAX PAID	\$ 1298
66. EXEMPTIONS CLAIMED	00
67. EARNED INCOME CREDIT	\$ 2210
68. FATHER'S INCOME EARNED FROM WORK	\$ (BLANK)
69. MOTHER'S INCOME EARNED FROM WORK	\$ 20000
70. AMOUNT FROM WORKSHEET A	\$ 4800
71. AMOUNT FROM WORKSHEET B	\$ (BLANK)
72. CASH, SAVINGS, AND CHECKING	\$ 100
73. NET WORTH OF REAL ESTATE/INVESTMENTS	\$ 0
74. NET WORTH OF BUSINESS	\$ 0
75. NET WORTH OF INVESTMENT FARM	\$ 0
76. PARENT(S) MARITAL STATUS	DIVORCED/SEPARATED
77. NUMBER OF FAMILY MEMBERS IN 1999-2000	02
78. NUMBER IN COLLEGE IN 1999-2000	1
79. PARENT(S) STATE OF LEGAL RESIDENCE	MA
80. LEGAL RESIDENT BEFORE JANUARY 1, 1994?	YES
81. DATE PARENT(S) BECAME LEGAL RESIDENT	(BLANK)
82. AGE OF OLDER PARENT	45
83. FIRST COLLEGE NAME	LYN UNIVERSITY
84. FIRST HOUSING STATUS	ON CAMPUS
85. SECOND COLLEGE NAME	TOWNE COLLEGE
86. SECOND HOUSING STATUS	ON CAMPUS
87. THIRD COLLEGE NAME	SKY COMMUNITY COLLEGE
88. THIRD HOUSING STATUS	ON CAMPUS
89. FOURTH COLLEGE NAME	(BLANK)
90. FOURTH HOUSING STATUS	(BLANK)
91. FIFTH COLLEGE NAME	(BLANK)
92. FIFTH HOUSING STATUS	(BLANK)
93. SIXTH COLLEGE NAME	(BLANK)
94. SIXTH HOUSING STATUS	(BLANK)
95. DATE COMPLETED	JANUARY 27, 1999
96. SIGNED BY	STUDENT AND PARENT
97. PREPARER'S SOCIAL SECURITY NUMBER	(BLANK)
98. PREPARER'S EIN	(BLANK)
99. PREPARER'S SIGNATURE	(BLANK)



**1999-2000 Student Aid Report (SAR)  
Federal Student Aid Programs  
Part 1 - Information Summary**

OMB No. 1840-0132  
Form Approved  
Exp. 12/31/2000

991-23-4567  
AN-01 DRN: 6234

**IMPORTANT:** Read **ALL** information in Part 1 to find out what to do with this Report.

**FOR FAA USE ONLY**

This information will be used by your Financial Aid Administrator to determine your eligibility for student aid.

Agency Source: 5	Model: D	FAA Adjustment Flag:
Record Source Code:	Duplicate Copy:	Reject Reasons:
Record Type:	SysGen:	Application Receipt Date: 01/28/1999
Verification	Dependency Override:	Transaction Receipt Date: 01/28/1999
Transaction Flag: A	Special Handling:	Subsequent Application Flag:
Tracking Flag: A	Reprocessing Code:	Early Analysis Flag:

MONTHS:            1    2    3    4    5    6    7    8    9    10   11   12

PRIMARY EFC:    00300 00300 00300 00300 00300 00300 00300 00300 00300 00300 00300 00300

SECONDARY EFC:

INTERMEDIATE COMPUTE VALUES:

TI: 000015200	ATI: 00009104	STX: 00000218	EA: 000002800	STI: 000000265
IPA: 000012260	AI: -00003904	CAI: -00003904	DNW: -00026700	FTI: 000018325
APA: 000026800	PCA: 000000000	AAI: -00003904	TPC: 000000000	
TSC: 000000000	PC: 000000000	SIC: 000000265	SCA: 000000035	

Auto Zero EFC Flag:            SMT Flag: N    Pell Eligible Flag: Y

MATCH FLAGS:

SSN Match Flag: 1	Selective Service Registration Flag:	Selective Service Match:
INS Match Flag:	INS Verification #:	SSA Citizenship Code: A
NSLDS Match Flag: 1	NSLDS Results Flag: 3	NSLDS Transaction Number: 01
VA Match Flag: 3		

COMMENTS: 008 151 170

# 1999-2000 Student Aid Report (SAR) FINANCIAL AID HISTORY

**DRAFT**  
Processed: 03-17-1999

This page contains your previous financial aid information, which is contained in the National Student Loan Data System (NSLDS). Your Financial Aid Administrator will use it to determine your eligibility.

#Overpayment: Contact: #Defaulted Loans: Y #Discharged: N #Loan Sat. Repayment: Y #Active Bankruptcy: N  
 Pell: Y OS  
 FSEOG: Y Access NSLDS  
 Perkins: Y 12345678

#Aggregate Amount for FPELP/Direct Loans:	Outstanding Principal Bal.:	Pending Disbursements:	Total:
Subsidized Loans:	\$123,456	\$123,456	\$123,456
Combined Loans:	\$123,456	\$123,456	\$123,456
FFEL Consolidated Loans:	\$123,456		\$123,456

#Perkins Loans:  
 Cumulative Loan Amount \$123,456 Current Year Loan Amount \$123,456  
 First Disbursement Prior to 10/1/92: Y Expanded Lending Option: Y

#1999-2000 Pell Payment Data:	Sch. Code:	Tran:	Sch. Amt:	Disb. Amt:	Rep. Amt:	% Sch. Used:	As of:	EFC:	Ver. Flag:
	76543210	01	\$1234	\$1234	\$1234	100.00	01/15/99	1234	X
	12345678	01	\$1234	\$1234	\$1234	100.00	01/15/99	1234	X
	12345678	01	\$1234	\$1234	\$1234	100.00	01/15/99	1234	X

Access NSLDS for additional Pell data.

Loan Detail:	Net Loan Amount	Loan Begin Date	Loan End Date	GA Code	School Code	Grade Level	Contact	Contact Type
#FFEL Stafford Unsubsidized Status Code DA as of 01/05/99 Outstanding Bal. \$123,456 as of 02/02/99	\$123,456	01/01/97	05/01/97	719	00132100	01	719	GA
#FFEL Stafford Subsidized Status Code FB as of 08/01/99 Outstanding Bal. \$123,456 as of 02/07/99	\$123,456	01/01/96	01/01/97	736	00132600	02	736	GA
#Direct Stafford Subsidized Status Code ID as of 08/06/99 Outstanding Bal. \$123,456 as of 02/03/99	\$123,456	01/01/96	01/01/97	N/A	00122700	03	5V0101	DL5
#Direct Consolidated Subsidized Status Code DL as of 12/06/99 Outstanding Bal. \$123,456 as of 01/01/99	\$123,456	08/01/95	05/10/96	N/A	00132100	04	5V0101	DL5
#Supplemental Loan (SLS) Status Code DX as of 05/01/99 Outstanding Bal. \$123,456 as of 02/02/99	\$123,456	01/01/95	04/01/95	701	00132600	05	N/A	N/A
#Perkins Expanded Lending Option Status Code DU as of 06/06/99 Outstanding Bal. \$123,456 as of 01/01/99	\$123,456	09/02/94	06/02/95	N/A	00132100	06	00132100	SCH
#FFEL Stafford Unsubsidized Status Code ID as of 08/01/99 Outstanding Bal. \$123,456 as of 08/02/96	\$123,456	09/01/94	12/01/94	734	00132100	07	830906	LEN
#Federal Perkins Status Code DL as of 01/01/96 Outstanding Bal. \$123,456 as of 02/01/99	\$123,456	04/01/93	01/01/94	N/A	00132300	07	00132300	SCH
#FFEL Stafford Subsidized Status Code RP as of 02/01/99 Outstanding Bal. \$123,456 as of 02/01/99	\$123,456	01/04/93	12/01/93	620	00132800	07	620	GA
#Federal Perkins Status Code DB as of 05/01/99 Outstanding Bal. \$123,456 as of 02/01/99	\$123,456	01/01/88	05/25/88	N/A	00132500	07	00132500	SCH
#FFEL Stafford Non-Subsidized Status Code DT as of 09/01/99 Outstanding Bal. \$123,456 as of 02/01/99	\$123,456	N/A	N/A	555	00132900	07	05	EDR
#FFEL Stafford Unsubsidized Status Code DB as of 05/01/99 Outstanding Bal. \$123,456 as of 02/02/99	\$123,456	N/A	N/A	555	00132700	07	04	EDR

Access NSLDS for additional loan records.



**YOU TOLD US**

**WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.**

16. Summer Term 1999 (BLANK)	Full time <input type="radio"/> 1 3/4 time <input type="radio"/> 2 Half time <input type="radio"/> 3 Less than half time <input type="radio"/> 4 Not attending <input type="radio"/> 5
18. Fall Semester or Quarter 1999 FULL TIME	Full time <input type="radio"/> 1 3/4 time <input type="radio"/> 2 Half time <input type="radio"/> 3 Less than half time <input type="radio"/> 4 Not attending <input type="radio"/> 5
20. Winter Quarter 1999-2000 (BLANK)	Full time <input type="radio"/> 1 3/4 time <input type="radio"/> 2 Half time <input type="radio"/> 3 Less than half time <input type="radio"/> 4 Not attending <input type="radio"/> 5
21. Spring Semester or Quarter 2000 FULL TIME	Full time <input type="radio"/> 1 3/4 time <input type="radio"/> 2 Half time <input type="radio"/> 3 Less than half time <input type="radio"/> 4 Not attending <input type="radio"/> 5
22. Summer Term 2000 (BLANK)	Full time <input type="radio"/> 1 3/4 time <input type="radio"/> 2 Half time <input type="radio"/> 3 Less than half time <input type="radio"/> 4 Not attending <input type="radio"/> 5

23. Father's Educational Level UNKNOWN	Middle school/Jr. High <input type="radio"/> 1 High school <input type="radio"/> 2 College or beyond <input type="radio"/> 3 Other/Unknown <input type="radio"/> 4
24. Mother's Educational Level HIGH SCHOOL	Middle school/Jr. High <input type="radio"/> 1 High school <input type="radio"/> 2 College or beyond <input type="radio"/> 3 Other/Unknown <input type="radio"/> 4

25. State of Legal Residence Abbreviation MA	<input type="text"/>
26. Did you become a legal resident of this state before January 1, 1994? YES	Yes <input type="radio"/> 1 No <input type="radio"/> 2
27. If you answered "No" to question 26, date you became a legal resident. (BLANK)	<input type="text"/> / <input type="text"/> / <input type="text"/> Use MM/CCYY format (e.g., 05/1980)
28. Are you male? NO	Yes <input type="radio"/> 1 No <input type="radio"/> 2
29. If you are male, 15-25, not registered, do you want Selective Service to register you? (BLANK)	Yes <input type="radio"/> 1 No <input type="radio"/> 2

30. Type of Degree/Certificate 1ST BA	Enter Code from instructions
31. Grade Level in College In 1999-2000?  1st yr. NEVER ATTENDED	1st yr. Never Attended ..... <input type="radio"/> 1 1st yr. Previously Attended ..... <input type="radio"/> 2 2nd yr. Sophomore ..... <input type="radio"/> 3 3rd yr. Junior ..... <input type="radio"/> 4 4th yr. Senior ..... <input type="radio"/> 5 5th yr. or More ..... <input type="radio"/> 6 Graduate/Professional ..... <input type="radio"/> 7

32. High School Diploma or GED? YES	Yes <input type="radio"/> 1 No <input type="radio"/> 2
33. First Bachelor's Degree by 7-1-1995? NO	Yes <input type="radio"/> 1 No <input type="radio"/> 2
34. Interested in Student Loans? YES	Yes <input type="radio"/> 1 No <input type="radio"/> 2
35. Interested in Work Study? * <input type="radio"/> YES	Yes <input type="radio"/> 1 No <input type="radio"/> 2
36. How Many Months Receive VA Benefits? * <input type="radio"/> 0%	<input type="text"/>
37. Monthly VA benefits amount * <input type="radio"/> 0%	\$ <input type="text"/>

38. Filed 1998 IRS Income Tax Return WILL FILE	Have already filed <input type="radio"/> 1 Will file, have not yet filed <input type="radio"/> 2 Not going to file <input type="radio"/> 3
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**YOU TOLD US**

39. Type of 1998 Tax Form Used  1040A/EZ/TF
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40. If you filed or will file a 1040, were you eligible to file a 1040A or 1040EZ? (BLANK)	Yes <input type="radio"/> 1 No/ <sup>con't</sup> know <input type="radio"/> 2
41. Adjusted Gross Income From IRS Form \$ 035125	\$ <input type="text"/>
42. U.S. Income Tax Paid \$ 00000	\$ <input type="text"/>
43. Exemptions Claimed 00	<input type="text"/>
44. Earned Income Credit \$ (BLANK)	\$ <input type="text"/>
45. Student's Income Earned From Work \$ 000125	\$ <input type="text"/>
46. Spouse's Income Earned From Work \$ (BLANK)	\$ <input type="text"/>
47. Amount From Worksheet A \$ (BLANK)	\$ <input type="text"/>
48. Amount From Worksheet B \$ (BLANK)	\$ <input type="text"/>
49. Cash, Savings, and Checking \$ 000100	\$ <input type="text"/>
50. Net Worth of Real Estate Investments \$ (BLANK)	\$ <input type="text"/>
51. Net Worth of Business \$ (BLANK)	\$ <input type="text"/>
52. Net Worth of Investment Firm \$ (BLANK)	\$ <input type="text"/>

**WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.**

A. IRS 1040.....	<input type="radio"/> 1
B. IRS 1040A, 1040EZ.....	<input type="radio"/> 2
C. A foreign tax return.....	<input type="radio"/> 3
D. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, Marshall Islands, the Federated States of Micronesia, or Palau.....	<input type="radio"/> 4

Step Two: STUDENT STATUS

YOU TOLD US	WRITE IN ONLY NEW OR CORRECTED INFORMATION.
53. Born Before 1-1-1976? NO	Yes <input type="radio"/> 1 No <input type="radio"/> 2
54. Working on a degree beyond a bachelor's degree in 1999-2000? NO	Yes <input type="radio"/> 1 No <input type="radio"/> 2
55. Are You Married? NO	Yes <input type="radio"/> 1 No <input type="radio"/> 2
56. Orphan or Ward of Court? NO	Yes <input type="radio"/> 1 No <input type="radio"/> 2

YOU TOLD US	WRITE IN ONLY NEW OR CORRECTED INFORMATION.
57. Veteran of U.S. Armed Forces? NO	Yes <input type="radio"/> 1 No <input type="radio"/> 2
58. Have Dependents Other Than Spouse? NO	Yes <input type="radio"/> 1 No <input type="radio"/> 2

Step Three: STUDENT HOUSEHOLD INFORMATION

59. Number of Family Members in 1999-2000 01	<input type="text"/>
60. Number in College in 1999-2000 1	<input type="text"/>

Step Four: PARENT(S) INFORMATION

61. Parent(s) Filed 1998 IRS Income Tax Return WILL FILE	Have already filed <input type="radio"/> 1 Will file, have not yet filed <input type="radio"/> 2 Not going to file <input type="radio"/> 3
62. Type of 1998 Tax Form Used IRS 1040/A/EZ/TEL	A. IRS 1040..... <input type="radio"/> 1 B. IRS 1040A, 1040 EZ, 1040 Telefile..... <input type="radio"/> 2 C. A foreign tax return..... <input type="radio"/> 3 D. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, Marshall Islands, the Federated States of Micronesia, or Palau..... <input type="radio"/> 4
63. If your parent(s) filed or will file a 1040, were they eligible to file a 1040A or 1040EZ? (BLANK)	Yes <input type="radio"/> 1 No, don't know <input type="radio"/> 2

64. Adjusted Gross Income From IRS Form \$ 020000	\$ <input type="text"/>
65. U.S. Income Tax Paid \$ 001298	\$ <input type="text"/>
66. Exemptions Claimed 02	<input type="text"/>
67. Earned Income Credit \$ 02210	\$ <input type="text"/>
68. Father's Income Earned From Work \$ (BLANK)	\$ <input type="text"/>
69. Mother's Income Earned From Work \$ 020000	\$ <input type="text"/>
70. Amount From Worksheet A \$ 04800	\$ <input type="text"/>
71. Amount From Worksheet B \$ (BLANK)	\$ <input type="text"/>
72. Cash, Savings, and Checking \$ 000100	\$ <input type="text"/>
73. Net Worth of Real Estate/Investments \$ 000000	\$ <input type="text"/>
74. Net Worth of Business \$ 000000	\$ <input type="text"/>
75. Net Worth of Investment Firm \$ 000000	\$ <input type="text"/>

YOU TOLD US	WRITE IN ONLY NEW OR CORRECTED INFORMATION.
76. Parent(s) Marital Status DIVORCED/SEPARATED	Married <input type="radio"/> 1 Single <input type="radio"/> 2 Divorced/Separated <input type="radio"/> 3 Widowed <input type="radio"/> 4

77. Parent(s) Number of Family Members in 1999-2000 02	<input type="text"/>
78. Number of Family Members in College in 1999-2000 1	<input type="text"/>
79. Parent(s) State of Legal Residence MA	<input type="text"/>
80. Parent(s) Legal Resident of the State Before 1-1-1994? YES	Yes <input type="radio"/> 1 No <input type="radio"/> 2
81. If no to question 80, enter the date parent became legal resident.	<input type="text"/> - <input type="text"/>
82. Age of Older Parent 45	<input type="text"/>

Step Five: RELEASES

YOU TOLD US

Housing Plans: 1 -- on-campus 2 -- off-campus 3 -- with parent(s)

YOU TOLD US	NEW/CORRECTED COLLEGE NAME, CITY, STATE	Enter Code From Above
83. First College Name, City and State IVY UNIVERSITY 2000 LEAGUE ST, BROOKSIDE, MA 02218		84. Housing Plans ON CAMPUS
85. Second College Name, City and State TOWER COLLEGE 1015 CITYSIDE DR, BOSTON, MA 02100		85. Housing Plans ON CAMPUS
87. Third College Name, City and State SKY COMMUNITY COLLEGE 400 BIG SKY DR, GREAT SKY, VT 05700		88. Housing Plans ON CAMPUS
86. Fourth College Name, City and State		89. Housing Plans (BLANK)
91. Fifth College Name, City and State		92. Housing Plans (BLANK)
93. Sixth College Name, City and State		94. Housing Plans (BLANK)
95. Date Completed JANUARY 27, 1999	DO NOT CORRECT	
96. Signed By? STUDENT AND PARENT	DO NOT CORRECT	
97. Preparer's Social Security Number		
98. Preparer's EIN		
99. Preparer's Signature		

Application Receipt Date: 01/26/1999

Step Six: SIGNATURES

IF YOU MADE NO CHANGES

- Do NOT send your SAR to either address given on this page.
- Follow the instructions on Part 1 of your SAR. You may need to contact your school.

IF YOU MADE CHANGES

- Read and sign the Certification statement to the right.
- Send BOTH pages of Part 2 to:

Federal Student Aid Programs  
P.O. Box 7023  
Lawrence, KS 66044-7023

IF YOU NEED ANOTHER COPY OF YOUR SAR

- Write to:  
Federal Student Aid Programs  
P.O. Box 7024  
Lawrence, KS 66044-7024

- Include your name, social security number, and signature.

You must read this Certification and sign below.

CERTIFICATION

All of the information on this SAR is true and complete to the best of my knowledge. If I am asked, I agree to give proof that my information is correct. This proof might include a copy of the 1998 U.S. Income Tax Form filed by me or my family. I understand that if I purposely give false or misleading information on this SAR, I may be subject to a \$10,000 fine, a prison sentence, or both.

Student Signature

1 Student	Date
-----------	------

JULIE A. ANDERSON

Parent Signature (use parent whose information is provided in Step Four.)

2 Parent	Date
----------	------

MDE Use Only

CE	Special Handle	
----	----------------	--

<b>School Use Only</b>	
<b>Professional Judgment</b>	
D/C	1 <input type="radio"/> 2 <input type="radio"/> FAA EFC Adjustment <input type="radio"/>
Federal School Code	
FAA Signature	

# 1999 – 2000 SAR INSTRUCTIONS AND CODES

## HELPFUL HINTS:

Use the following checklist to ensure you've done everything necessary in order to apply for Federal student aid.

- ❑ Read all the comments on Part 1 of your SAR. This will help you to correct any information we had questions about when we processed your financial aid application.
- ❑ Review ALL the items on Part 2 of your SAR to make sure that the information is correct. Follow the instructions at the top of Part 2.
- ❑ If you need to make corrections or respond to boldface items, contact your financial aid office to determine if your school can submit these corrections electronically. Electronic processing is faster.
- ❑ If you've made any corrections on this SAR that need to be processed, you (and your parent, if necessary) must sign the certifications located on the last page of this SAR and return your SAR to Federal Student Aid Programs, P.O. Box 7023, Lawrence, KS 66044-7023. Keep a copy of your SAR for your records.
- ❑ If you believe we entered your data incorrectly, contact the Federal Student Aid Information Center on 1-800-4FED-AID (1-800-433-3243). The information specialist will determine if we made a data entry error. If so, the specialist may be able to correct your data over the phone.
- ❑ If you (and your family) have unusual circumstances, such as tuition expenses at an elementary or secondary school, unusual medical or dental expenses not covered by insurance, a family member who recently became unemployed, or changes in income or assets that affect your eligibility for financial aid, contact your financial aid office.
- ❑ Do not send any documentation (including tax forms) to the address next to your signature. This documentation will be discarded. If your financial aid administrator (FAA) requests documentation, send it directly to the financial aid office.
- ❑ If you only need to change your address or change the schools you have listed, you can make these changes over the telephone by calling 1-319-337-5663. Only you (the applicant) can make this request and you must have the Data Release Number (DRN) that is printed on Part 1 and Part 2 of your SAR when you call.

## CODES FOR QUESTION 39: TYPE OF DEGREE/CERTIFICATE

- 1 1<sup>st</sup> Bachelor's degree
- 2 2<sup>nd</sup> Bachelor's degree
- 3 Associate degree (occupational or technical program)
- 4 Associate degree (general education or transfer program)
- 5 Certificate or diploma for completing an occupational, technical, or educational program, less than two years
- 6 Certificate or diploma for completing an occupational, technical, or educational program of at least two years
- 7 Teaching credential program (non-degree program)
- 8 Graduate or professional degree
- 9 Other/Undecided

## NEED HELP?

If you do not know how to answer a question, want further assistance correcting your SAR, want to know the status of the submission of your application, need general information concerning student financial aid, or do not understand what to do next, you have several options:

- > Refer to the instructions that came with your application;
- > Call 1-800-4FED-AID (1-800-433-3243); (TDD = 1-800-730-8913);
- > Write to Federal Student Aid Programs, P.O. Box 34, Washington, DC 20044-0034;
- > Contact the financial aid office at the school you plan to attend, or
- > Visit our website at [www.ed.gov/finaid.html](http://www.ed.gov/finaid.html)

**ATTENTION:** Did you know that you could file your *FAFSA* or *RENEWAL FAFSA on the Web*? Next year you can file your form electronically by going to:

[www.fafsa.ed.gov](http://www.fafsa.ed.gov)

## THE OFFICE OF MANAGEMENT & BUDGET WANTS YOU TO KNOW:

- According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1840-0132. The time required to complete this information collection is estimated to be an average of 15 to 30 minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collected. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form please write to: U.S. Department of Education, Washington, DC 20202-4651. If you have any comments or concerns regarding the status of your individual submission of this form, write directly to: Federal Student Aid Information Center, P.O. Box 84, Washington, DC 20044.
- By answering questions 83 through 94, and signing the Free Application for Federal Student Aid, you gave permission to the U.S. Department of Education to provide information from your application to the college(s) listed in Step 5. You also agreed that such information is deemed to incorporate by reference the certification statement in step 6 of the financial aid application.

**WARNING:** As more fully set forth in Section 5301 of the Anti-Drug Abuse Act of 1988, if you are convicted of drug distribution or possession, your eligibility for Title IV student financial aid is subject to suspension or termination.



Information Acknowledgement  
 1999-2000 Student Aid Report (SAR)  
 Federal Student Aid Programs

OMB No. 1840-0122  
 Form Approved  
 Exp. 12/31/00

**DRAFT**

1. LAST NAME	
2. FIRST NAME	
3. MIDDLE INITIAL	
4. PERMANENT STREET ADDRESS	
5. CITY	
6. STATE ABBREVIATION	
7. ZIP CODE	
8. SOCIAL SECURITY NUMBER	
9. DATE OF BIRTH	
10. PERMANENT HOME PHONE NUMBER	
11. DO YOU HAVE A DRIVER'S LICENSE?	
12. DRIVER'S LICENSE NUMBER	
13. DRIVER'S LICENSE STATE ABBREVIATION	
14. CITIZENSHIP STATUS	
15. ALIEN REGISTRATION NUMBER	
16. MARITAL STATUS	
17. DATE OF MARITAL STATUS	
18. ENROLLMENT STATUS SUMMER TERM 1999	
19. ENROLLMENT STATUS FALL SEM/QTR 1999	
20. ENROLLMENT STATUS WINTER QTR 99-2000	
21. ENROLLMENT STATUS SPRING SEM/QTR 2000	
22. ENROLLMENT STATUS SUMMER TERM 2000	
23. FATHER'S EDUCATION LEVEL	
24. MOTHER'S EDUCATION LEVEL	
25. STATE OF LEGAL RESIDENCY ABBREVIATION	
26. LEGAL RESIDENT BEFORE JANUARY 1, 1994?	
27. DATE YOU BECAME A LEGAL RESIDENT	
28. ARE YOU MALE?	
29. REGISTER YOU FOR SELECTIVE SERVICE?	
30. TYPE OF DEGREE/CERTIFICATE	
31. GRADE LEVEL IN COLLEGE IN 1999-2000	
32. HIGH SCHOOL DIPLOMA OR GED?	
33. FIRST BACHELOR'S DEGREE BY 7-1-1999?	
34. INTERESTED IN STUDENT LOANS?	
35. INTERESTED IN WORK STUDY?	
36. HOW MANY MONTHS RECEIVE VA BENEFIT?*	
37. MONTHLY VA BENEFITS AMOUNT	\$
38. FILED 1998 IRS INCOME TAX RETURN	
39. TYPE OF 1998 TAX FORM USED	
40. ELIGIBLE TO FILE A 1040A OR 1040EZ?	
41. ADJUSTED GROSS INCOME FROM IRS FORM	\$
42. U.S. INCOME TAX PAID	\$
43. EXEMPTIONS CLAIMED	
44. EARNED INCOME CREDIT	\$
45. STUDENT'S INCOME EARNED FROM WORK	\$
46. SPOUSE'S INCOME EARNED FROM WORK	\$
47. AMOUNT FROM WORKSHEET A	\$
48. AMOUNT FROM WORKSHEET B	\$
49. CASH, SAVINGS, AND CHECKING	\$
50. NET WORTH OF REAL ESTATE/INVESTMENTS	\$

51. NET WORTH OF BUSINESS	\$
52. NET WORTH INVESTMENT FARM	\$
53. BORN BEFORE 1-1-1974?	
54. MONTHS ON DEGREE BEYOND BACHELOR'S?	
55. ARE YOU MARRIED?	
56. ORPHAN OR WARD OF COURT?	
57. VETERAN OF U.S. ARMED FORCES?	
58. HAVE DEPENDENTS OTHER THAN SPOUSE?	
59. NUMBER OF FAMILY MEMBERS IN 1999-2000	
60. NUMBER IN COLLEGE IN 1999-2000	
61. PARENT(S) FILED 1998 INCOME TAX RETURN	
62. TYPE OF 1998 TAX FORM USED	
63. ELIGIBLE TO FILE A 1040A OR 1040EZ?	
64. ADJUSTED GROSS INCOME FROM IRS FORM	\$
65. U.S. INCOME TAX PAID	\$
66. EXEMPTIONS CLAIMED	
67. EARNED INCOME CREDIT	\$
68. FATHER'S INCOME EARNED FROM WORK	\$
69. MOTHER'S INCOME EARNED FROM WORK	\$
70. AMOUNT FROM WORKSHEET A	\$
71. AMOUNT FROM WORKSHEET B	\$
72. CASH, SAVINGS, AND CHECKING	\$
73. NET WORTH OF REAL ESTATE/INVESTMENTS	\$
74. NET WORTH OF BUSINESS	\$
75. NET WORTH OF INVESTMENT FARM	\$
76. PARENT(S) MARITAL STATUS	
77. NUMBER OF FAMILY MEMBERS IN 1999-2000	
78. NUMBER IN COLLEGE IN 1999-2000	
79. PARENT(S) STATE OF LEGAL RESIDENCE	
80. LEGAL RESIDENT BEFORE JANUARY 1, 1994?	
81. DATE PARENT(S) BECAME LEGAL RESIDENT	
82. AGE OF OLDER PARENT	
83. FIRST COLLEGE NAME	
84. FIRST HOUSING STATUS	
85. SECOND COLLEGE NAME	
86. SECOND HOUSING STATUS	
87. THIRD COLLEGE NAME	
88. THIRD HOUSING STATUS	
89. FOURTH COLLEGE NAME	
90. FOURTH HOUSING STATUS	
91. FIFTH COLLEGE NAME	
92. FIFTH HOUSING STATUS	
93. SIXTH COLLEGE NAME	
94. SIXTH HOUSING STATUS	
95. DATE COMPLETED	
96. SIGNED BY	
97. PREPARER'S SOCIAL SECURITY NUMBER	
98. PREPARER'S TIN	
99. PREPARER'S SIGNATURE	

Processing Results

Record Type:	Expected Family Contribution: Primary	Dependency Status Model:
Verification Trans. Flag:	Secondary	Dependency Override
Verification Trans. 2 Flag:	Automatic Det. EFC Flag	Puplicate Request Indicator:
Application Received Date:	Formula Type:	Hold Code:
Transaction Process Date:	Simplified Needs Test Flag:	Subsequent Application Flag:
Transaction Receipt Date:	FAA EFC Adjustment	Pell Eligible Flag:
System Generated Indicator:		
SSN Match Flag:	Selective Service Registration Flag	Selective Service Match
NS Match Flag:	NS Verification #:	SSA Citizenship Code:
NSLDS Match Flag:	NSLDS Results Flag	NSLDS Transaction Number:
VA Match Flag:		
Reject Codes:		
Comment Codes:		

1999-2000 Institutional Student Information Record

Student ID	556-88-1003 BL 01	EPC	<b>DRAFT</b>	C C
STEP ONE (THE STUDENT) (Q1-Q52)		Dependency Status		INDEPENDENT
Name	CINDY BLACK	Cash, Savings, and Checking		0
Address:	51017 PHILLIPSWAY	Net Worth of Investments		0
	STERLING PA 44001	Net Worth of Business		0
Social Security Number	556-88-1003	hNet Worth of Investment Farm		0
Date of Birth	03/27/1968	STEP TWO (THE STUDENT) (Q53 - Q56)		
Permanent Home Phone #	(510)555-1234	*Born Before 1-1-1976?		YES
Have Driver's License?	1	Enrolled Grad/Prof Prog 1999-2000		NO
Driver's Lic	OH000-00-00005-OH	Are you Married?		NO
Citizenship Sta	U.S. Citizen	Orphan or Ward of the Court		NO
Alien Registration Number		Veteran of U.S. Armed Forces		NO
Marital Status	UNMARRIED	hDependents Other Than Spouse?		NO
Date of Marital Status		STEP THREE (Q59 - Q60)		
Enrollment Sta Summ 1999		STUDENT (AND SPOUSE)		
Enrollment Sta Fall 1999	FULL TIME	*Number in Household		01
Enrollment Sta Wint 2000		*Number in College in 1999-2000		1
Enrollment Sta Spr 2000	FULL TIME	STEP FOUR (PARENTS) (Q61 - Q82)		
Enrollment Sta Summ 2000		1998 Tax Form Filed Status		FILED
Father's Educational Level	COLLEGE	Type of 1998 Tax Form Used	1040A/EZ/TE	
Mother's Educational Level	COLLEGE	Eligible to File 1040A or 1040EZ?		YES
State of Legal Residence	OH	Parent's 1998 AGI		11000
Legal Resident before 1-1-1994?	YES	Parent's 1998 Tax		520
If No, Date of Legal Res.		Parent's 1998 Exemptions		03
Are You Male?	NO	Earned Income Credit		0
Register for Selective Service?		Father's Income from Work		0
Degree/Cert	CERT/DIPL>2	Mother's Income from Work		11000
Yr in Coll 1999-2000	1st YR NEVER ATT	Amt from Worksheet A		19000
Have HS Diploma/GED?	YES	Amt from Worksheet B		0
Bachelor's Degree by 7-1-1999?	NO	Cash, Savings, and Checking		0
Interested in Student Loans?	YES	Net Worth of Investments		0
Interested in Work Study?	YES	Net Worth of Business		0
No. of Months VA Benefits Received	0	Net Worth of Investment Farm		0
Amount Per Month of VA Benefits	0	Marital Status		WIDOWED
1998 Tax Form Filed Status	NOTFILING	Number in Household		03
Type of 1998 Tax Form Used		Number in College in 1999-2000		2
Eligible to File 1040A or 1040EZ?	YES	State of Legal Residence		OH
Student and Spouse 1998 AGI	0	Legal Residents before 1-1-1994?		YES
Student and Spouse 1998 Tax	0	If No, Date of Legal Res.		
Student and Spouse 1998 Exemptions		Age of Older Parent		
Earned Income Credit	0			
Student's Income from Work	0			
Spouse's Income from Work	0			
Amt from Worksheet A	600			
Amt from Worksheet B	0			

1999-2000 Institutional Student Information Record

Student ID 556-88-1003 BL 01  
 Last Name BLACK  
 STEP 5 (Q83-Q94)  
 College 1 001002 House 1  
 College 2 House 2  
 College 3 House 3  
 College 4 House 4  
 College 5 House 5  
 College 6 House 6

EFC

0 C

**DRAFT**

STEP 6 (Q95-Q99)  
 Date Application Completed 01/24/1999  
 Student Signature SIGNED  
 Parent Signature SIGNED  
 Preparer's SSN  
 Preparer's EIN  
 Preparer's Signature

OFFICE INFORMATION

DRN  
 Primary EFC Type 5  
 Secondary EFC Type 2  
 Processed Date 01/18/1999  
 Application Source  
 ISIR Transaction Type AUTOMATIC ISIR  
 Institution Number 031002  
 Reject Override Codes:  
 B N W  
 Assumption Override Codes:  
 1 2 3 4 5 6 7

FAA INFORMATION

Date ISIR Received 12/09/1998  
 Verification Type  
 System Generated Indicator  
 FAA EFC Adjustment Flag  
 Date Application Received 02/31/1999  
 Reprocessing Code

Early Analysis Flag  
 Rejects Met:  
 Verification Flag 2  
 Dependency Override  
 Duplicate Request  
 Correction # Applied to  
 Transaction Receipt Date

Pell Paid EFC	PRIMARY	Pell Elig Flag	Y	Intermediate Values
Primary EFC	0	Secondary EFC	0	TI 600 APA
Mon 1 0 Mon 7	0	Mon 1 0 Mon 7	0	FTI 600 PCA
Mon 2 0 Mon 8	0	Mon 2 0 Mon 8	0	ATI 4280 AAI
Mon 3 0 Mon 10	0	Mon 3 0 Mon 10	0	STX 30 TPC
Mon 4 0 Mon 11	0	Mon 4 0 Mon 11	0	IPA 4250 TSC
Mon 5 0 Mon 12	0	Mon 5 0 Mon 12	0	EA 0 PC
Mon 6 0		Mon 6 0		AI -3680 SIC
				DNW CAI -1840
				SCA
				STI
Auto Zero EFC Flag				Subsequent App Flag
SMT Flag	YES			

Match Flags: SSN 3 SSA INS PRI DED SS NSLDS 4 VA  
 INS Ver. No. SS Registration Flag  
 NSLDS Transaction Number 1 NSLDS Database Results Flag 1

Comments: 006,149,117,118,061,062,152,130,134,124  
 041,116

1999-2000 Institutional Student Information Record

CINDY BLACK

556-86-1003

1999-2000 NSLDS FINANCIAL AID HISTORY

Processed: 01/19/1999

This page contains your previous financial aid information, which is contained in the National Student Loan Data System (NSLDS). Your Financial Aid Administrator will use it to determine your eligibility.

\*\*\*\*\*  
 #Overpayment: Contact: Defaulted Loans:Y Discharged:N Loan Sat. Repay:N Active Bank:Y  
 Pell: Y G4  
 FSEOG: N N/A  
 Perkins: N N/A  
 \*\*\*\*\*

Aggregate Amount	Outstanding	Pending	Total:
FPEL/Direct Loans:	Prin. Bal.:	Disb(s):	
Subsid Loans:	\$ 1,514	\$ N/A	\$ 1,514
Combined Loans:	\$ 1,514	\$ N/A	\$ 1,514
FPEL Consol. Loans:	\$ N/A		\$ N/A

Perkins Loans:  
 Outstanding Principal Bal.: \$ N/A Current Year Loan Amount: \$ N/A  
 First Disbursement Prior To 10/1/1992: N  
 \*\*\*\*\*

1999-2000 Pell Payment Data:

Sch.Code:	Tran:	Sch.Amt:	Disb.Amt	Rem.Amt:	%Sch.Used:
As Of:	Pell Verification Flag: EPC:				
Sch.Code:	Tran:	Sch.Amt:	Disb.Amt	Rem.Amt:	%Sch.Used:
As Of:	Pell Verification Flag: EPC:				
Sch.Code:	Tran:	Sch.Amt:	Disb.Amt	Rem.Amt:	%Sch.Used:
As Of:	Pell Verification Flag: EPC:				

Loan Detail:	Net Loan Amount	Begin Date	End Date	GA Code	School Code	Grade Level	Contact/ Cntct Type
Direct Stafford Subsidized	\$ 900	08/31/1998	05/07/1999	N/A	00132100	A	32100 DLS
Status Code ID as of 08/31/1998							
Outstanding Bal. \$900 as of 09/30/1998							
Direct Stafford Subsidized	\$ 2,750	08/29/1994	12/16/1994	N/A	00132900	G	32100 DLS
Status Code DO as of 06/29/1997							
Outstanding Bal. \$614 as of 08/31/1998							



## Checkpoint #2: Output Documents

Fill in the blanks using the correct letter from the choices below. Each choice is used only once.

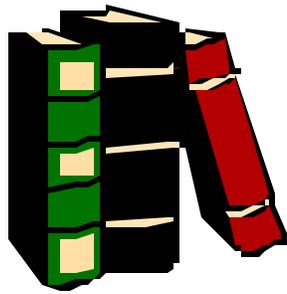
- |  |                                   |
|--|-----------------------------------|
| a) <i>Central Processing System (CPS)</i>      | g) <i>Information Review Form</i> |
| b) <i>Data Release Number (DRN)</i>            | h) <i>ISIR</i>                    |
| c) <i>EDEXpress</i>                            | i) <i>Pell-Eligible</i>           |
| d) <i>Student Aid Report (SAR)</i>             | j) <i>Pell-Ineligible</i>         |
| e) <i>SAR Information Acknowledgement (IA)</i> | k) <i>Rejected</i>                |
| f) <i>Information Request Form</i>             |                                   |

After submitting her FAFSA using FAFSA on the Web, Fran received her \_\_\_\_\_, which was \_\_\_\_\_ because her EFC was too high. She discovered that she had forgotten to list one school, Simon College, so she had to resubmit her data to the \_\_\_\_\_ for reprocessing. Soon, Simon College received a(n) \_\_\_\_\_ for Fran.

Richard's SAR came back with an EFC of 0. Since he has yet to receive a bachelor's degree, his SAR is \_\_\_\_\_. Richard noticed that he spelled the name of his street wrong, so he wrote the correction on Part 2 of the SAR, which was a(n) \_\_\_\_\_.

Instead of sending the FAFSA himself, Dustin took his FAFSA to the school. The school entered the data using \_\_\_\_\_. Soon, Dustin received his \_\_\_\_\_.

Jessica submitted a paper FAFSA. She forgot to include several items, so she received no EFC. Her SAR was \_\_\_\_\_. Part 2 of her SAR was a(n) \_\_\_\_\_. Her school told her they could submit her changes for her if she supplied the school with her \_\_\_\_\_.



# Resources Resources

- ★ *The 1999-00 High School Counselor's Handbook*
  
- ★ *A Guide to 1999-00 SARs and ISIRs*  
(GEN-98-30)
  
- ★ The 1999-00 FAFSA
  
- ★ FAFSA on the Web at <http://www.fafsa.ed.gov>
  
- ★ FAFSA Express: call 1-800-801-0576 to order or download from:  
<http://www.ed.gov/offices/OPE/express.html>
  
- ★ Action Letter #3 (GEN-98-26)  
(application processing)

# Answer



# Key

## Tony' s Questions

- 1) She should not include her ARN. She should just mark U.S. citizen for #15.
- 2) He should indicate on the FAFSA the status of his marriage on the day he completes the form.
- 3) Certain state and private agencies award scholarships for first-generation postsecondary school students.
- 4) Tony should still mark “1<sup>st</sup> year, Never Attended.”
- 5) Tony should say yes to all loan sources. He can always refuse them later.
- 6) He should estimate. If the real amounts differ, he can correct his data later.
- 7) His friend is a veteran. Only a dishonorable discharge would preclude him from being a veteran.
- 8) Tony should use his mom' s tax information, since Tony lived with her the most over the past year. If he had lived with both parents equally, he would have included the parent who covered the most expenses for him.
- 9) Tina *must* get her stepmother' s financial data in order to complete the FAFSA.
- 10) Sam should still use his parents' financial information.
- 11) The amount Howie' s aunt spends on his food and shelter (in-kind support) should not be included as income. However, the amount to cover his car payment (cash support) should be included as untaxed income.
- 12) Since his sister is part of his immediate family, she is included because his parents provide more than half of her expenses.
- 13) Tony' s girlfriend would include Tony in her household size since she is covering more than half of his expenses and he is living under her roof.
- 14) The order of the colleges does not matter.
- 15) A preparer is someone who actually fills out the form in place of the student, not someone who simply helps the student understand the questions, so you should not fill out Step Six.

## Checkpoint #1 – Types of FAFSAs

- 1) **F**
- 2) **T**
- 3) **T**
- 4) **F**
- 5) **T**
- 6) **T**
- 7) **F**

## Answer Key (cont' d)

### Checkpoint #2: Output Documents

After submitting her FAFSA using FAFSA on the Web, Fran received her **SAR**, which was **Pell-Ineligible** because her EFC was too high. She discovered that she forgot to list one school, Simon College, so she had to resubmit her data to the **CPS** for reprocessing. Soon, Simon College received a(n) **ISIR** for Fran.

Richard's SAR came back with an EFC of 0. Since he has yet to receive a bachelor's degree, his SAR is **Pell-Eligible**. Richard noticed that he spelled the name of his street wrong, so he wrote the correction on Part 2 of the SAR, which was a(n) **Information Review Form**.

Instead of sending the FAFSA himself, Dustin took his FAFSA to the school. The school entered the data using **EDExpress**. Soon, Dustin received his **SAR IA**.

Jessica submitted a paper FAFSA. She forgot to include several items, so she received no EFC. Her SAR was **rejected**. Part 2 of her SAR was a(n) **Information Request Form**. Her school told her they could submit her changes for her if she supplied the school with her **DRN**.